Faysal Aziz

Advanced Cassidy AI Controls and Automation

Build reliable workflows with stronger logic, integrations, and oversight.

FA-0510 · 1 Day

Software Development · Automation, RPA & Power Platform

Introduction

Duration: 1 Day

Effective AI automation must do more than generate useful responses. It must follow business rules, use approved information, handle exceptions, and preserve human control over important actions. Cassidy AI provides these capabilities through configurable Agents, multi-step Workflows, permission-aware knowledge access, organizational instructions, and approval-controlled connectors.

This course concentrates on improving the reliability, control, and operational value of Cassidy AI solutions used for document processing, underwriting support, referrals, and business-system activities. The instructor has over 30 years of industry experience and will use real, industry-demanded content rather than an academic approach.

Learning outcomes

Participants will be able to:

- Design specialized Cassidy Agents with precise operating boundaries
- Build Workflows containing conditions, variables, approvals, and exception paths
- Configure controlled access to knowledge and connected applications
- Develop advanced underwriting and referral processes
- Test AI outputs and workflow behaviour systematically
- Apply governance and deployment controls

Prerequisites

- Practical familiarity with Cassidy Agents and Workflows
- Understanding of routine insurance and underwriting processes
- Access to an approved Cassidy AI workspace
- Approved non-confidential training documents
- No programming experience required

Training outline

1. Advanced Agent and Knowledge Design

Specialized Agent architecture

1. Defined responsibilities and boundaries
2. Structured instructions and outputs
3. Mandatory escalation conditions

Knowledge configuration

1. Source and collection selection
2. Conflicting information handling
3. Permission-aware access

Organizational controls

1. Global instructions
2. Confidentiality requirements
3. Decision-authority restrictions

2. Advanced Workflow Construction

Workflow architecture

1. Triggers, actions, and variables
2. Sequential and conditional processing
3. Reusable workflow components

Business-rule automation

1. Eligibility conditions
2. Authority and referral conditions
3. Missing-information paths

Exception management

1. Failed actions and integrations
2. Manual intervention routes
3. Workflow recovery controls

3. Underwriting Process Automation

Submission review

1. Document classification and extraction
2. Completeness and consistency checks
3. Risk-information summarization

Guideline and referral processing

1. Risk appetite alignment
2. Exception identification
3. Referral-package preparation

Renewal and policy review

1. Material change identification
2. Claims and exposure comparison
3. Outstanding requirement tracking

4. Connectors and Human Oversight

Connected application controls

1. Read and write permissions
2. User and shared connections

3. Approval-controlled actions

Human review design

1. Risk-based review points
2. Authority-based approvals
3. Communication approval

Audit and traceability

1. Source verification
2. Action records
3. Approval evidence

5. Testing and Operational Governance

Agent and Workflow testing

1. Normal and exceptional cases
2. Restricted and incomplete requests
3. Conditional-path validation

Output quality assurance

1. Accuracy and completeness
2. Source support
3. Business-rule compliance

Controlled deployment

1. Pilot scope and success criteria
2. Ownership and monitoring
3. Change management and ongoing review

Disclaimer

This course outline is provided as a general instructional guideline and does not constitute a fixed or contractually binding programme. The trainer reserves the right to amend, reorganize, substitute, expand, reduce, or omit topics when reasonably necessary to address participant requirements, organizational priorities, platform developments, operational constraints, or professional considerations, without prior notice.

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